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ABSTRACT

Retreats, which have been used by churches and corporations for some time, are currently being looked into by college presidents and boards of trustees as a means of training and problem solving. While many types of retreats may not be appropriate for boards, a well-planned working retreat can be an effective way for trustees to: (1) really get to know one another and the backgrounds, skills, and philosophies that have shaped individual points of view; (2) become better acquainted with the college's chief executive officer (CEO), administrative staff, faculty, support staff, and student government; (3) be informed about the progress of academic programs, vocational activities, and program successes; (4) be made aware of institutional concerns, potential problems, and the need for changes in program direction or policy; and (5) plan and articulate the role and mission of the college. Retreats also furnish the environment for listening--the most important role performed by board members--to the CEO and to other members of the college community. Northeastern Junior College (NJC) holds two board workshops per year. Agendas for these meetings, developed by the CEO and the board, brought to the board's attention issues such as long-range planning, logos, building names, alcohol on campus, the need for a development office, and salary negotiation procedures. The experiences of NJC have shown that the success of retreats is affected by the attendance of all board members; adequate planning; participation by faculty, staff, and students; media awareness of the site and agenda of the meeting; sufficient time for relaxation; and the understanding by all members that the retreats are for listening, discussing, and learning, rather than decision making. (AYC)

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THE BOARD RETREAT:
FOR LISTENING, LEARNING AND UNDERSTANDING

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Paper presented at the 16th Annual Convention
of the Association of Community College Trustees
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THE BOARD RETREAT - FOR LISTENING, LEARNING AND UNDERSTANDING

A Presentation for Workshop No. 2, Board Retreats
16th Annual Convention, Association of Community College Trustees
October 4-5, 1985 - Denver, Colorado

James W. Read, Presenter

The Board Retreat - It's not a new idea. In times of crises, our American Indians would retreat to an out-of-the way holy place for new vision. Churches have used the retreat to plan programs and seek spiritual guidance. Corporate America was slow to recognize its potential; now, having discovered the good news, managers are embracing it as the "best thing since motherhood and apple pie." Now CEO's and boards of trustees look to the retreat for member training and problem solution.

Retreats are not new. I can look back to my 27 years as one of Colorado State University's cooperative extension agents and see that, because we were scattered throughout Colorado, we had to get together every now and then for the "word from the head shed" or to plan cooperative programs. Of course, these gatherings were not called retreats--they were known as district meetings or annual conferences.

It didn't really matter what we called them because they served the basic function of a retreat. Namely,

- A chance to get to know each other; who we were; our strong points, and our hang-ups.
- It was also an opportunity to meet and to know the boys at the top.
- A chance to get the latest word on extension program direction and objectives.
- A chance to discuss and articulate ongoing programs, long-range plans and potential pitfalls.
- It provided an opportunity to individually and collectively evaluate our performance as extension educators and county extension directors.
- We also had a chance to voice our concerns.
- I personally always returned to the routine of my job with new enthusiasm and new ideas.

It is unfortunate that many college boards have not utilized the potential of the well-planned board retreat. We, as board members, are not alone. Many boards and councils that are elected or appointed to serve in the public sector continue to function without really getting down to the nitty-gritty of internalizing the responsibilities of their positions.

For example I was elected a member of my college board in 1977. I was asked to run for election because the then-members of the board were afraid someone with an ax to grind would. I guess I was the lesser of the available evils.

I had worked with NJC and lived in the community for 14 years. I also worked for a university, knew what colleges were supposed to do, and I had been successful in teaching, managing advisory boards and personnel. However, I didn't know the internal workings of the college for which I was supposed to be setting policy.

I knew my fellow board members, but had never worked with them in any administrative capacity. The chief executive officer was a very competent administrator with 30 years experience as President of our College. He had built the school virtually from the ground up. Board meetings were well planned, discussion was effectively structured and, overall, the meetings were well conducted. But the two of us who were new on the board sometimes felt that we just didn't really understand what we were doing. We just didn't know enough about our institution and its internal mechanisms.

Six years ago, our president retired and a new chief executive officer was employed. He had the foresight to recognize the need for the board to become more involved in structuring the philosophy and purpose of our college. He recognized that we needed time to become personally acquainted with one another and with the ramifications of our responsibilities.

Our first board/staff retreat was held in a mountain resort in April of 1981 - I missed the first day. That was the only day of the nine retreats we have had that I missed, and I still regret it. However, I will admit that I did not regret the experience of driving to the site in one of Colorado's spring blizzards.

Perhaps this is the time to digress and look at what a retreat is and what it is supposed to do for you and your organization.

The reasons for retreats are as diverse as are the purposes and the settings. They can range from the "let's play golf and work a little, if we have time" to the "strap on the life preservers and expect to be terrified because it'll be good for you." I really don't subscribe to either extreme, although I have been a party to both.

Probably the best known retreat is the company sales meeting. Everyone assembles in some sunny place; mornings are devoted to pep talks, tales of wondrous new products, sales goals are set, and the carrot tied to a new stick. Afternoons are reserved for group recreation, and the evenings for banquets and socializing.

Right now, the most common type of retreat is the genuine training session --the individuals are taken to a site away from their phone and their day-to-day responsibilities where they can devote full time to the training task at hand. Sometimes these sessions are as much fun as a college course in statistics. However, they are effective and best suited to our purpose.

Some retreats are the regular annual get-togethers like we used to have at our extension conferences. They contain as many surprises as your annual budget. Then, there are the hot ones--held because the heat is on someone; things are not working. Perhaps the company has just been acquired by a competitor or two camps can't get along. So they get together to talk about X and solve that X problem. Often, the hot session has an ulterior motive, such as what the human resources type call "a bonding session." It may also be designed to scare the

bejabbers out of the complacent troups.

I don't recommend that college boards of trustees initiate fun-in-the-sun retreats, and scaring the bejabbers out of the troops is not the way to go either. However, well-planned working retreats are productive. It will give you a chance to really get to know each other. I feel that is important. If there is dissension in your group, the retreat may help everyone to understand each other's point of view, based on that individual's background, skills and philosophy. I can't overemphasize the importance of getting to know one another in a setting away from the "goldfish-bowl atmosphere" of the official board meeting.

The retreats, or workshops as we now call them, also provide the opportunity to become better acquainted with your chief executive officer, members of his administrative staff, representatives of the faculty association, support staff and associated student government.

Well structured board retreats provide the environment for the administration or department heads to inform the board about the progress of academic programs, vocational activities, exciting opportunities, or just plain brag a bit about their programs and staff. Positive reports are program builders.

By the same token, administrative reports can document concerns, potential problems, and the need for a change in program direction or policy. It provides an opportunity for questions that individual board members would be reluctant to ask in an official board meeting.

The retreat provides time for board members to take an in depth look at problems; evaluate the impact of policy change, look at new opportunities, and plan and articulate the role and mission of the college.

The retreat also furnishes the environment of listening. Listening is probably the most important role we have as board members. Listening to what is said, without having to think about what our immediate response must be, frees us to hear what is said. Listening gives us a chance to understand what the chief executive officer is saying. Listening will let us know what is happening that should concern us. Listening provides a safe opportunity for input from students, faculty, non-teaching professionals and support staff.

Listening is an art and a skill. It's a skill board members must cultivate. It's hard to do, but it can be done. That is why I advocate the involvement of faculty, support staff, and students in some or all retreats. It's their college too. If they have a complaint, listen. It may not be legitimate, but listen anyhow--don't argue, ask for suggestions, but don't kick those suggestions to pieces. Remember, everyone has a pet log they want to put into the pile. If you kick it out and break it all to pieces, you're telling that person you're not interested in their input. The fact that they have the opportunity to put their log in the pile is important. As time goes on, they'll put some good ones in.

If you're cited as the bad guys, don't debate it; they may be right. Besides, it takes two to fight. Remember, the retreat or workshop will improve a board's understanding of their responsibilities and their skills in performing their duties as a member of the board.

We at NJC now have two workshops per year. They are held at one of our local motels. The first one we had was held out or town; however, it limited staff participation, was costly, and did raise some eyebrows. So now we meet in town. We have a planned agenda that is available to the press and to the public if they request. The press is not specifically invited because we are extra careful not to take any action that would violate the Sunshine Laws. On the one occasion when action was necessary, the media was notified that action was to be taken, and they were in attendance for that portion of the program.

The board and the chief executive officer cooperate in developing the program's agenda. Reports are delegated by the President to the appropriate members of his administrative team. Faculty, non-teaching professional staff, support staff and student government representatives have an opportunity to give input or report concerns in appropriate areas.

In our nine workshops, we have tried to solve some building needs; we're still working on that one. We investigated the potential of a development office--it was implemented and is working. Other topics have been long-range planning, logos, building names, role of board and staff, the college's mission and direction, alcohol on the campus, local vendor preference, accreditation procedures and the accreditation aftermath, salary negotiations procedures, picnics, outreach programs tuition and fees, Associated student government fees, handicapped accessibility, program expansion and program reduction.

We have also looked at bond issues, a cooperative building program, faculty morale, early retirement bonuses, administrative reorganization and its resulting impact, semester versus quarter system, merit pay, and faculty-staff evaluation.

That's not everything, but it's a good laundry list. I'm pleased to report that while we don't always agree, we have never resorted to a shouting match. Probably because we have maintained a listening and constructive questioning environment.

We have never used the board retreat as a self-evaluation tool, but it would be helpful if we did. We have, however, used executive privilege during the workshop to evaluate our chief executive officer.

The board retreat is not the answer to all problems, and it is not always a winner. There are pitfalls and I would be remiss if I didn't cite some of them: 1) Everyone should attend--don't let the phone or your business interfere. Being a good trustee requires time and the retreat can be time well spent. 2) Have a planned agenda with input from the board and chief executive officer. But leave

an open end for unexpected input. Choose a site that's accessible to everyone but away from the campus and board room. 3) Allow time on the agenda for faculty, students and staff. It's their college too. 4) Be sure that the media knows the agenda and the site. 5) Listen. If you don't understand, then ask relevant questions. Be sure your chief executive officer listens too. 6) Discuss, but when you disagree, don't argue about a point or with an individual. Listen. Listening coupled with constructive discussion can make the retreat uninteresting to any media persons that may attend. An argument, on the other hand, is news for the front page. The same goes for your chief executive officer. Often the criticisms that arise are aimed at that individual. 7) Don't kick someone's pet log. 8) If you have to have an executive session, state the purpose. Arrive at a consensus and speak in public as one body. Don't carry tales out of the executive session. 9) Do not make decisions at retreats. Do that in your official board meeting. Retreats are for listening, learning and understanding. 10) Leave plenty of time for comfort breaks, informal coffee breaks, attitude adjustment, dinner and social relaxation.

In summary, board retreats, or workshops, provide an opportunity for members of the board to become better acquainted with one another and with the personnel of their college. A well-structured agenda will better acquaint them with their college, its strengths, and its weaknesses. The results will be an informed board that can react in a positive manner when developing institutional policy, and at the same time be responsive to the needs of the people in their college's service area.

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JWR/hw
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